



DIVISION OF PLANNING FREDERICK COUNTY, MARYLAND

Winchester Hall 12 East Church Street Frederick, Maryland 21701 (301) 600-1138

TO: Board of County Commissioners

FROM: Eric E. Soter, Acting Director
Division of Planning

DATE: May 24, 2007

RE: Development Pipeline Update

ISSUE:

Receive information regarding Development Pipeline Status.

BACKGROUND:

During the development of the CIP this past year the BoCC indicated a desire for Planning staff to provide and update on the Status of the Development Pipeline in the County.

To that end, staff has prepared a number of tables and charts to illustrate the development pipeline both at the County and Municipal level. The data is generally current to April of 2007. Like with any data and statistics the information is based on the best available. Every effort was made to research the best available and most accurate information.

There are multiple ways to measure the development pipeline and each category is important in its own right. Staff has broken down the pipeline into various categories, Traditional Pipeline, Recorded Units Available, Unrecorded Pass APFO, and Pending APFO.

The **Traditional Pipeline** includes Dwelling Units Approved less Building Permits Issued. Includes major rezonings in the County (i.e. PUD/MXD) that have yet to receive Phase II approval.

The Traditional Pipeline Development then falls into one of the following three categories:

Recorded Units Available = Traditional Pipeline Units that are Recorded less Building Permits Issued

Unrecorded Pass APFO = Traditional Pipeline Units Approved/Exempt APFO that are not recorded.

Pending APFO = Traditional Pipeline Units Approved that are Pending APFO Approval.

A summary of the attachments is described below:

Attachment 1 – Development Pipeline Summary County /Municipal Comparison

Attachment 2 – Countywide Development Pipeline Summary by Planning Region Spreadsheet includes the County totals for major developments plus ‘Additional Available Lots’ such as smaller development (under 25 units) or larger developments with only a few recorded units available. The information from the ‘Additional Available Lots’ are pulled from the monthly recorded lots available listing maintained by the Division. Municipal data includes that information from the municipalities within those planning regions.

Attachment 3 – Countywide Development Pipeline Summary by Planning Region Graph

Attachment 4 – Allocation of Age-Restricted vs Conventional Units and Allocation of Market Rate vs. MPDU Units

Attachment 5 – Major Projects Development Pipeline Detailed Spreadsheet

RECOMMENDATION:

This is an informational item where staff will touch on some of the highlights and no action is contemplated.

Development Pipeline Summary County /Municipal Comparison

As of April 2007

	Traditional Pipeline	Recorded Units Available	Unrecorded Pass APFO	Pending APFO
Municipalities (1)	8,583	3,554	1,950	2,972
County (2)	17,736	3,062	6,112	8,562
Total County	26,319	6,616	8,062	11,534

Traditional Pipeline = Dwelling Units Approved less Building Permits Issued. Includes major rezonings in the County (i.e. PUD/MXD) that have yet to receive Phase II approval

The Traditional Pipeline Development falls into one of the following three categories:

Recorded Units Available = Traditional Pipeline Units that are Recorded less Building Permits Issued

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(1) The City of Frederick accounts for the majority of the Municipal Pipeline, nearly 6,000 Units.

(2) Of the 8,562 Dwelling Units Pending APFO in the County, @ 5,450 are within Eaglehead/Lake Linganore Development.

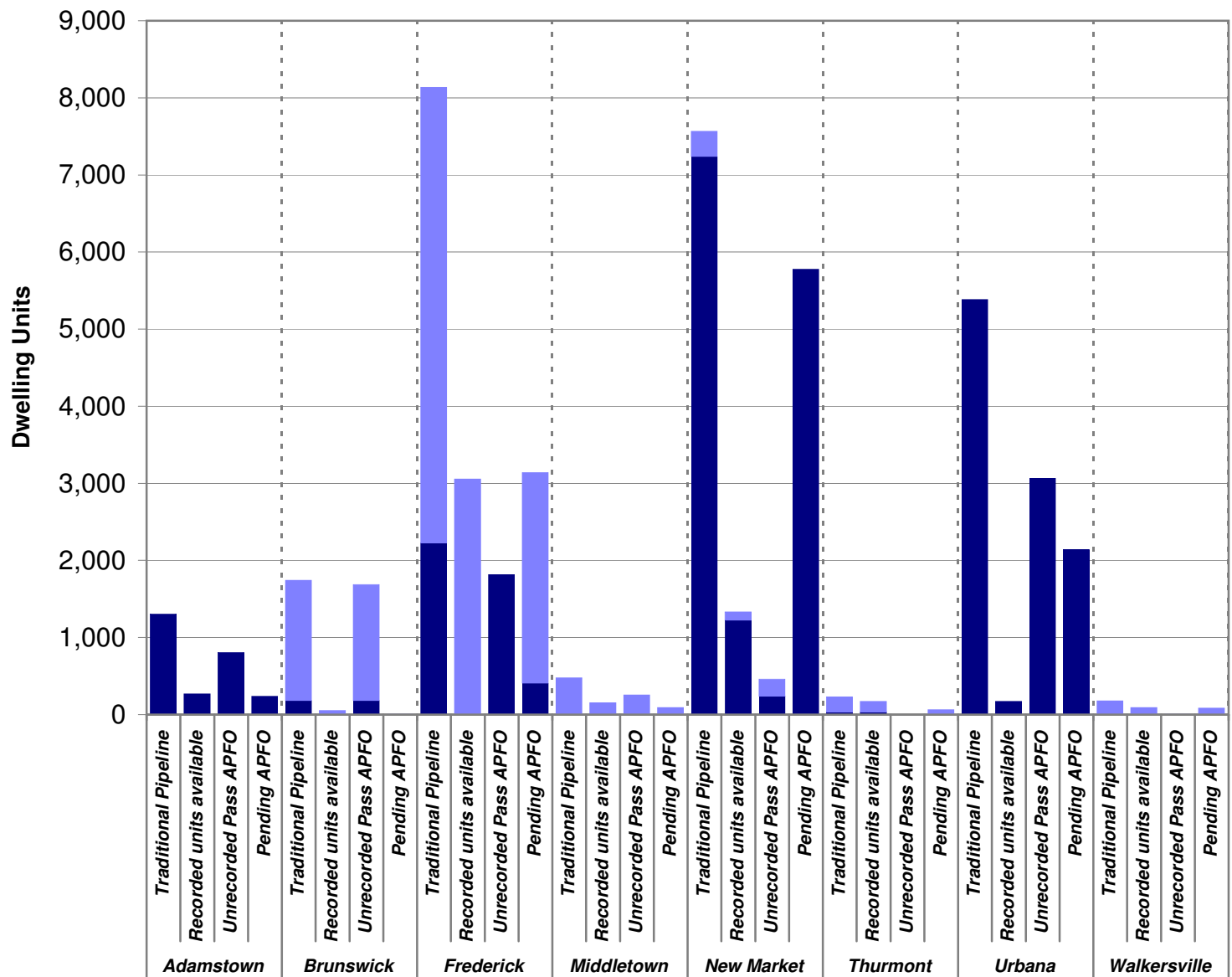
Planning Region	County/Municipal Comparison	Dwelling Units Approved	Bldg Permits Issued	Traditional Pipeline	Recorded Units Available	Unrecorded Pass APFO	Pending APFO
		A	B	(A-B)	(C-B)	D	(A-C-D)
Adamstown	County Active Major Projects	1,825	517	1,308	266	805	237
	County Additional Available Lots	0	0	53	53	0	0
	County Total	1,825	517	1,361	319	805	237
	Municipal Project Total	0	0	0	0	0	0
	Region Total	1,825	517	1,361	319	805	237
Brunswick	County Active Major Projects	181	0	181	0	181	0
	County Additional Available Lots	0	0	97	97	0	0
	County Total	181	0	278	97	181	0
	Municipal Project Total	1,785	224	1,561	52	1,505	4
	Region Total	1,966	224	1,839	149	1,686	4
Frederick	County Active Major Projects	2,224	0	2,224	0	1,818	406
	County Additional Available Lots	0	0	257	257	0	0
	County Total	2,224	0	2,481	257	1,818	406
	Municipal Project Total	10,526	4,615	5,911	3,053	0	2,731
	Region Total	12,750	4,615	8,392	3,310	1,818	3,137
Middletown	County Active Major Projects	0	0	0	0	0	0
	County Additional Available Lots	0	0	236	236	0	0
	County Total	0	0	236	236	0	0
	Municipal Project Total	872	394	478	154	253	91
	Region Total	872	394	714	390	253	91
New Market	County Active Major Projects	10,360	3,123	7,237	1,222	238	5,777
	County Additional Available Lots	0	0	195	195	0	0
	County Total	10,360	3,123	7,432	1,417	238	5,777
	Municipal Project Total	329	26	303	113	190	0
	Region Total	10,689	3,149	7,735	1,530	428	5,777
Thurmont	County Active Major Projects	52	20	32	32	0	0
	County Additional Available Lots	0	0	172	172	0	0
	County Total	52	20	204	204	0	0
	Municipal Project Total	380	228	152	91	0	61
	Region Total	432	248	356	295	0	61
Urbana	County Active Major Projects	7,735	2,351	5,384	172	3,070	2,142
	County Additional Available Lots	0	0	161	161	0	0
	County Total	7,735	2,351	5,545	333	3,070	2,142
	Municipal Project Total	0	0	0	0	0	0
	Region Total	7,735	2,351	5,545	333	3,070	2,142
Walkersville	County Active Major Projects	0	0	0	0	0	0
	County Additional Available Lots	0	0	199	199	0	0
	County Total	0	0	199	199	0	0
	Municipal Project Total	313	135	178	91	2	85
	Region Total	313	135	377	290	2	85
Countywide	County Active Major Projects	22,377	6,011	16,366	1,692	6,112	8,562
	County Additional Available Lots	0	0	1,370	1,370	0	0
	County Total	22,377	6,011	17,736	3,062	6,112	8,562
	Municipal Project Total	14,205	5,622	8,583	3,554	1,950	2,972
	Cumulative Region Total	36,582	11,633	26,319	6,616	8,062	11,534
	County/Municipal Comparison	Dwelling Units Approved	Bldg Permits Issued	Traditional Pipeline	Recorded Units Available	Unrecorded Pass APFO	Pending APFO
	data from 4/1/2007						

Frederick County

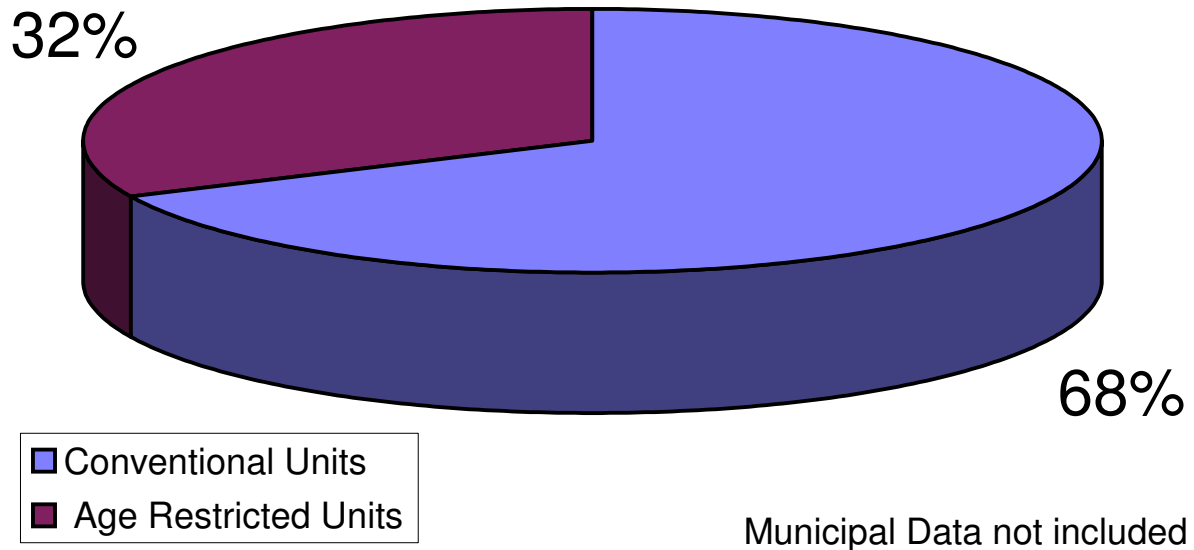
Pipeline Development by Planning Region

■ Municipality
■ County

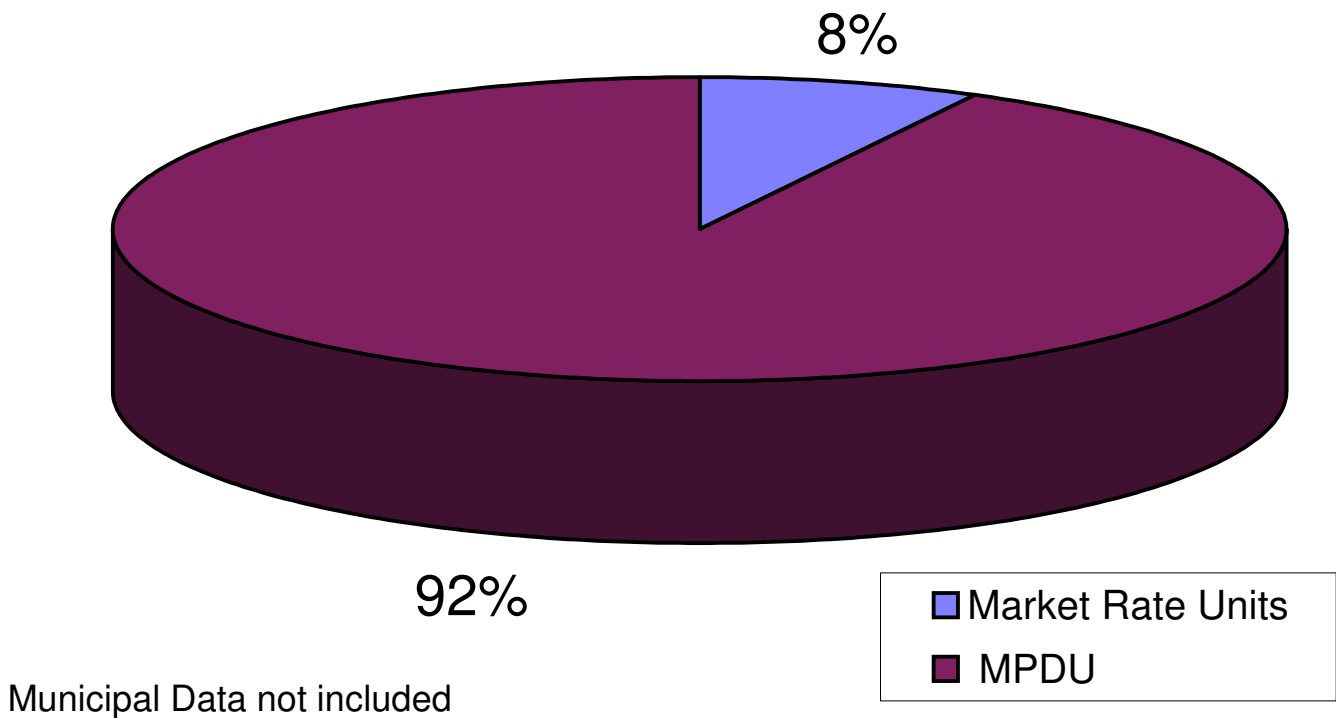
Data current to April 2007



Allocation of Conventional - Age Restricted Units



Allocation of Market Rate - MPDU



Subdivision	Dwelling Units Approved A Input	Bldg Permits/Units Issued B Input	Traditional Pipeline C (A-B)	Recorded Units D Input	Recorded Units Available E (D-B)	Unrecorded Pass APFO F Input	Pending APFO G (A-D-F)	APFO Pipeline H (D+F-B)
Column Formula								
Brunswick *								
Galyn Manor	280	224	56	276	52	0	4	52
Brunswick Crossing	1,505	0	1,505	0	0	1,505	0	1,505
Brunswick Subtotal	1,785	224	1,561	276	52	1,505	4	1,557
Burkittsville								
Burkittsville Subtotal	0	0	0	0	0	0	0	0
Emmitsburg								
Brookfield	144	94	50	144	50	0	0	50
Emmit Ridge	88	27	61	27	0	0	61	0
Southgate	36	29	7	36	7	0	0	7
Emmitsburg Subtotal	268	150	118	207	57	0	61	57
Frederick City								
Ballenger Creek Center Towns	176	107	69	176	69	0	0	69
Barrick	301	0	301	0	0	0	301	0
Birdseye View Estates (Bowers)	39	0	39	39	39	0	0	39
Bowers Park	21	10	11	21	11	0	0	11
Brooklawn Limited Partnership	44	0	44	0	0	0	44	0
Cannon Bluff	187	0	187	187	187	0	0	187
Carroll Creek Site D	120	0	120	0	0	0	120	0
Clover Ridge	393	169	224	393	224	0	0	224
Commons of Avalon	66	0	66	66	66	0	0	66
Conley Estates (Not Approved)	0	0	0	0	0	0	0	0
Cramer Property	54	0	54	0	0	0	54	0
Emerald Farms	185	179	6	185	6	0	0	6
Galleria	127	0	127	0	0	0	0	0
Hargett PND	645	0	645	645	645	0	0	645
Jefferson Center Townhomes	15	0	15	0	0	0	15	0
Main Property	175	154	21	175	21	0	0	21
Market Square	459	0	459	0	0	0	459	0
Maxwell Square	49	0	49	0	0	0	49	0
Millies Delight	59	0	59	59	59	0	0	59
Monocacy Park	120	0	120	0	0	0	120	0
Nicodemus	457	0	457	0	0	0	457	0
North Crossing	487	410	77	487	77	0	0	77
Odd Fellows	546	0	546	0	0	0	546	0
Overlook Section 8	32	0	32	0	0	0	32	0
River Crest	114	107	7	114	7	0	0	7
Riverside Apartments Lot 301	312	216	96	312	96	0	0	96
Rocky Pointe	15	14	1	15	1	0	0	1
Tuscarora Creek	847	196	651	847	651	0	0	651
Walnut Ridge	521	317	204	521	204	0	0	204
Waverley View PND	739	0	739	339	339	0	400	339
Whittier PND	1,590	1,520	70	1,590	70	0	0	70
Worman's Mill PND	1,497	1,216	281	1,497	281	0	0	281
Worman's Mill (Town Square Centre)	134	0	134	0	0	0	134	0
Frederick City Subtotal	10,526	4,615	5,911	7,668	3,053	0	2,731	3,053
Middletown								
Foxfield Phase 2-6	154	127	27	148	21	26	0	47
Foxfield Senior - Villages	81	34	47	81	47	0	0	47
Glenbrook	350	233	117	319	86	31	0	117
Chesterbrook Phase 2	16	0	16	0	0	16	0	16
Horman Apartments	9	0	9	0	0	9	0	9
Old Towne Villas	4	0	4	0	0	4	0	4
Coblentz	91	0	91	0	0	0	91	0
Middletown Subtotal	705	394	311	548	154	86	91	240
Mt. Airy*								
Mt. Airy Subtotal	0	0	0	0	0	0	0	0
Myersville*								
Clark/Fawley	4	0	4	0	0	4	0	4
Meadow Ridge Knoll	14	0	14	0	0	14	0	14
Saber Ridge	41	0	41	0	0	41	0	41
Quail Run	108	0	108	0	0	108	0	108
Myersville Subtotal	167	0	167	0	0	167	0	167
New Market								
Royal Oaks	120	26	94	74	48	46	0	94
Brinkley Manor	105	0	105	28	28	77	0	105
Orchard at New Market	104	0	104	37	37	67	0	104
New Market Subtotal	329	26	303	139	113	190	0	303
Rosemont								
Thurmont *								
Altamont Garden Apts.	0	0	0	0	0	0	0	0
Hobb's Division	2	0	2	2	2	0	0	2
Jermoe Estates	108	78	30	108	30	0	0	30
Park Lane Estates	2	0	2	2	2	0	0	2
Sandy Spring Knolls	0	0	0	0	0	0	0	0
Thurmont Subtotal	112	78	34	112	34	0	0	34
Walkersville *								
Sun Meadow	265	135	130	180	45	0	85	45
Walkersville Subtotal	265	135	130	180	45	0	85	45
Woodsboro								
Beall Subdivision	2	0	2	0	0	2	0	2
Grimes Subdivision	4	0	4	4	4	0	0	4
James Street	3	0	3	3	3	0	0	3
Stauffer Subdivision	2	0	2	2	2	0	0	2
Woodbury	37	0	37	37	37	0	0	37
Woodsboro Subtotal	48	0	48	46	46	2	0	48
Municipal Subtotal	14,205	5,622	8,583	9,176	3,554	1,950	2,972	5,504

Subdivision	Dwelling Units Approved	Bldg Permits Issued	Traditional Pipeline	Recorded Units	Recorded Units Available	Unrecorded Pass APFO	Pending APFO	APFO Pipeline Rec+UR P APFO
Column Formula	A Input	B Input	C (A-B)	D Input	E (D-B)	F Input	G (A-D-F)	H (D+F-B)
Frederick County *								
Adamstown Commons	200	99	101	193	94	7	0	101
Ballenger Run	970	0	970	0	0	970	0	970
Bare/Nusbaum	38	0	38	0	0	0	38	0
Crouch Farms/Property	23	0	23	0	0	23	0	23
Canal Run PUD	325	165	160	290	125	35	0	160
Eaglehead/Lake Linganore								
Alpine	100	0	100	0	0	0	100	0
Aspen	355	54	301	220	166	135	0	301
Aspen North	117	0	117	117	117	0	0	117
Audubon Terrace	204	166	38	200	34	0	4	34
Balmoral 829 E	78	66	12	78	12	0	0	12
Casey	1,796	0	1,796	0	0	0	1,796	0
Coldstream	235	229	6	233	4	2	0	6
Heritage Ridge	1,200	0	1,200	0	0	0	1,200	0
Indian Caves	20	0	20	0	0	0	20	0
Isle Balmoral 829 C	110	0	110	110	110	0	0	110
Lake Anita Louise	126	122	4	126	4	0	0	4
Meadows	406	357	49	406	49	0	0	49
Nightingale	75	12	63	33	21	42	0	63
North Shore	127	125	2	127	2	0	0	2
Pinehurst	750	531	219	691	160	59	0	219
Resco Inv.	248	0	248	0	0	0	248	0
Summerfield	327	327	0	327	0	0	0	0
Town Center	1,440	0	1,440	0	0	0	1,440	0
Vistas at Pinehurst	20	0	20	0	0	0	20	0
Westridge	624	0	624	0	0	0	624	0
Westwinds	500	339	161	500	161	0	0	161
Woodridge	226	144	82	226	82	0	0	82
Woodridge Retreat	98	0	98	98	98	0	0	98
Eaglehead - Subtotal	9,182	2,472	6,710	3,492	1,020	238	5,452	1,258
Geisbert Property	297	0	297	0	0	297	0	297
Green Hill Manor	300	253	47	300	47	0	0	47
Green Valley PUD	1,100	0	1,100	0	0	1,100	0	1,100
Greenview PUD	449	276	173	449	173	0	0	173
Harvest Ridge	222	119	103	119	0	0	103	0
Jefferson Tech Park East	825	0	825	0	0	825	0	825
Jefferson Tech Park West	375	0	375	0	0	0	375	0
Kidwiler Farms	87	54	33	87	33	0	0	33
Lawyer Estates	52	20	32	52	32	0	0	32
Linton Farm	763	0	763	0	0	763	0	763
Main's Heights	78	19	59	19	0	0	59	0
Meadows at New Market	212	173	39	173	0	0	39	0
Monrovia PUD	1,608	0	1,608	0	0	0	1,608	0
Pollekoff	34	0	34	0	0	0	34	0
Preston	121	35	86	35	0	0	86	0
Urbana PUD	3,411	1,767	1,644	1,854	87	1,557	0	1,644
Urbana Highlands	471	319	152	371	52	100	0	152
Urbana Town Center	500	0	500	0	0	0	500	0
Westview South	31	0	31	0	0	0	31	0
Whispering Creek	58	29	29	58	29	0	0	29
Windsor Knolls	227	211	16	211	0	16	0	16
Woodbourne Manor (smith prop)	181	0	181	0	0	181	0	181
Younkins	237	0	237	0	0	0	237	0
County Subtotal	22,377	6,011	16,366	7,703	1,692	6,112	8,562	7,804
All other recorded lots available			1,370		1,370			
Total			17,736	7,703	3,062	6,112	8,562	7,804
TOTAL (County+Municipality)	36,582	11,633	26,319	16,879	6,616	8,062	11,534	13,308
Subdivision	Dwelling Units Approved	Bldg Permits Issued	Traditional Pipeline	Recorded Units	Recorded Units Available	Unrecorded Pass APFO	Pending APFO	APFO Pipeline Rec+UR P APFO
A	B	(A-B)	C	(C-B)	D	(A-C-D)	(C+D-B)	